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AUTHOR Hellweg, Susan A.; And Others
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ABSTRACT

A study examined the evaluative structures employed by voters in making decisions about political contenders, specifically as a function of the level of the election involved and the incumbent-challenger status of the candidates. Data were obtained by questionnaires administered within two weeks prior to the 1984 general election to 550 undergraduate students of voting age at a large western university. The questionnaires were designed to assess subject evaluations of eight sources: presidential candidates Ronald Reagan and Walter Mondale; vice-presidential candidates George Bush and Geraldine Ferraro; San Diego mayoral candidates Roger Hedgecock and Dick Carlson; and San Diego judicial candidates William Mudd and Mary Franklin. Competence emerged as the primary factor only at the presidential level, while character emerged as the primary factor for both vice-presidential and mayoral campaigns. The results suggest that incumbent positioning does make a difference in perceptual criteria formation for candidates (such that the incumbent may set the agenda for the challenger), that such criteria are idiosyncratic to individual candidates and election contexts, but that accurate predictions can be made of voting behavior once these idiosyncratic criteria are known. (Nine tables of data are included.) (KEH)

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COMPARATIVE CANDIDATE EVALUATION AS A FUNCTION OF ELECTION LEVEL AND CANDIDATE INCUMBENCY

Susan A. Hellweg

Stephen W. King

Steve E. Williams

Department of Speech Communication

San Diego State University

International Communication Association Convention
Political Communication Division
Chicago, Illinois
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ABSTRACT

The purpose of this study was to examine comparative political candidate evaluation. Specifically, three research questions were addressed in the context of the data collected from the 1984 general election campaign: (1) do the criteria voters use in making candidate evaluations vary as a function of election level; (2) do the criteria voters use differ among candidates within the same election level; and (3) do the criteria voters use vary for incumbents and challengers within the same election level. The results of the study suggest that incumbent positioning does make a difference in perceptual criteria formation for candidates (such that the incumbent may set the agenda for the challenger), that such criteria are idiosyncratic to individual candidates and election contexts, but that accurate predictions can be made of voting behavior once these idiosyncratic criteria are known.

COMPARATIVE CANDIDATE EVALUATION AS A FUNCTION OF ELECTION LEVEL AND CANDIDATE INCUMBENCY

An election requires voters to assess the relative acceptability of the available candidates and, ultimately, to decide to vote for a specific individual. Studies of decision making among voters have often suggested that voters make a unitary decision in this process, that is, a single decision that simultaneously results in the decision to vote for one candidate and against another on the same criteria.[1]

Numerous studies have been conducted on the nature and consequences of candidate image.[2] Specifically, these studies have examined the components of candidate image,[3] the effects of time upon image,[4] the nature of ideal candidate image,[5] and the importance of candidate image in voter comparisons of candidates.[6] Obviously, the most important finding has been the consistent relationship between candidate image and the voter's intention to vote for a particular candidate.[7] Though many of these studies have employed a source valence conceptualization of image, there has been little consistency among studies in the manner in which political candidate image has been treated. Clarification of the nature and importance of candidate image was the principal intent of the present study.

Hellweg and King studied the possibility that candidate-specific judgment criteria were employed by voters in the 1980 general election.[8] They specifically tested the adequacy of the assumption of a unitary judgment of political candidate image. The results of that study demonstrated that voters employed different factor structures and composition in the judgment of Reagan and

Carter. Furthermore, the voters were shown to differentially rank the importance of even those image criteria that were common to Reagan and Carter. Simply, the 1980 research established that voters employed different standards in judging the two candidates.

The present study was undertaken as an extension of the earlier image research by Hellweg and King. This study sought to find answers to three research questions: (1) Does the level of election affect the nature of political image employed by voters in their evaluation of candidates? (2) Does the nature and composition of the political image of different candidates vary between candidates in the same level of election? and (3) Does the role of incumbent or challenger, per se, affect the nature and composition of the political image evaluation?

Methodology

The 550 subjects employed in this study were undergraduate students of voting age at a large western university. Questionnaires were administered to all subjects during a regularly scheduled class within two weeks prior to the 1984 general election.[9] The instructions indicated to subjects that their participation was entirely voluntary and that the data would remain confidential and unattributed.

The questionnaires were designed to assess subject evaluations of eight target sources: presidential candidates Ronald Reagan and Walter Mondale; vice-presidential candidates George Bush and Geraldine Ferraro; San Diego mayoral candidates Roger Hedgecock and Dick Carlson; and San Diego judicial candidates William Mudd and Mary Franklin.[10] For each assessment twenty-nine semantic differential scales for the perceived credibility of public figures were used.[11] Next, subjects were asked to indicate their likely voting preference.

The data derived from the questionnaire administration were submitted to two statistical procedures: (1) principal component factor analysis with varimax rotation to determine the factor structures that subjects employed for each of the target sources; and (2) stepwise discriminant analysis to assess the ability of a linear combination of selected credibility scales to predict candidate preference.

In order for a factor to be considered for subsequent analysis, it was required to contain a minimum of two scales that met the inclusion criteria of a primary loading of .55 or greater and a secondary loading of no greater than .40. An eigenvalue of less than 1.0 resulted in termination of factor extraction.

Results

Three dimensions of credibility emerged as a result of the factor analyses for Reagan and Mondale. The Reagan factor structure accounted for 81.8 percent of the total variance and the Mondale factor structure accounted for 91.5 percent of the total variance. The three Reagan factors were labeled as follows: (1) Factor One -- Competence; (2) Factor Two -- Extroversion; and (3) Factor Three -- Sociability. The three Mondale factors were labeled as follows: (1) Factor One -- Competence; (2) Factor Two -- Sociability; and (3) Factor Three -- Extroversion.

Two dimensions of credibility emerged as a result of factor analysis for Bush and Ferraro. The Bush factor structure accounted for 83.1 percent of the total variance and the Ferraro factor structure accounted for 86.3 percent of the total variance. The two Bush factors were labeled as follows: (1) Factor One -- Character; and (2) Factor Two -- Character/Competence. The two Ferraro factors were labeled as follows: (1) Factor One -- Character/Competence; and (2) Factor Two -- Extroversion.

Three dimensions of credibility emerged as a result of factor analyses for Hedgecock and Carlson. The Hedgecock factor structure accounted for 90.2 percent of the total variance. The Carlson factor structure accounted for 79.8 percent of the total variance. The three Hedgecock factors were labeled as follows: (1) Factor One -- Character; (2) Factor Two -- Extroversion; and (3) Factor Three -- Character/Competence. The three Carlson factors were labeled as follows: (1) Factor One -- Extroversion; (2) Factor Two -- Character; and (3) Factor Three -- Competence.

Five dimensions of credibility emerged as a result of the factor analysis for Mudd, while the analysis revealed four credibility factors for Franklin. The Mudd factor structure accounted for 85.2 percent of the total variance and the Franklin factor structure accounted for 85.1 percent of the total variance. The content of the various factors for both judicial candidates was generally so heterogeneous as to defy reasonable labelling.

The stepwise discriminant analysis was performed using each set of target source credibility scales to test the classification of subjects into voting groups. At the presidential candidate level, 96.9 percent of the Reagan voters and 95.5 percent of the Mondale voters were classified correctly, giving an overall appropriate grouping percentage of 96.51. At the vice-presidential candidate level, 94.0 percent of the Bush voters and 85.7 percent of the Ferraro voters were classified correctly, giving an overall appropriate grouping percentage of 91.06. At the mayoral level, 97.5 percent of the Hedgecock voters and 91.9 percent of the Carlson voters were classified correctly, giving an overall appropriate grouping percentage of 95.69. Low subject numbers assigned to individual cells rendered such an analysis at the judicial level meaningless.[12]

Discussion

This study sought to examine the evaluative structures employed by voters in making decisions about political contenders, specifically as a function of the level of the election involved and the incumbent-challenger status of the candidates.

The first research question concerned the potential effects of election level upon candidate image criteria. Competence emerged as the primary factor only at the presidential level. Character emerged as the primary factor for both vice-presidential and mayoral campaigns. The variance accounted for by the primary factor decreased considerably as a function of election level and was relatively even among candidates at each level: (1) Reagan, 70 percent, and Mondale, 70 percent; (2) Bush, 74 percent, and Ferraro, 75 percent; (3) Hedgecock, 65 percent, and Carlson, 51 percent; and (4) Mudd, 53 percent, and Franklin, 55 percent. This suggests that the primary factor of candidate image becomes less important as the campaign becomes more localized and candidates do not have the heightened visibility available in presidential races. At the presidential level the primary factor is critical to the success of a candidate's campaign, since greater stability is suggested in the factor analytic structure.

The second research question assessed the specific factor analytic content of opposing candidates. The factor structure for Ferraro was particularly interesting as she represents the first female to run on a presidential/vice-presidential ticket. It is interesting to note that her first factor is comprised of a combination of 10 character and competency items, suggesting a combined view on the most important criterion for electing a female to national office. This result strongly suggests that voters were responding to

a third factor -- possibly her gender -- and consistently reflecting that third factor judgment in their evaluations across the more traditional image items from a variety of factors. The Hedgecock-Carlson mayoral structures also point to some interesting findings. In a campaign directed frequently at incumbent mayor Hedgecock's indictment over questionable campaign finance practices, the primary factor indicated for Hedgecock was character, while the primary factor for his opponent, a former television newscaster, was extroversion. The vice-presidential and mayoral candidate findings suggest that a politician's historical background and the context of an election play roles in the specific criteria utilized by voters in evaluating campaign contenders. Thus, once again there appears to be evidence suggesting that, indeed, individual candidates precipitate the use of idiosyncratic factor structures and composition. To the extent that opposing candidates are similar in background and are viewed fairly "standard" candidates, they probably will be judged similarly. However, whenever an individual's candidacy presents something nonstandard, such as an outstanding indictment or a history-making female presence on a national ticket, those candidates will have their image evaluated against idiosyncratic standards.

The third research question assessed the potential effects of candidate incumbency-challenger positioning in the election upon the criteria voters employ in evaluating him/her. As a presidential challenger in the 1980 general election, Reagan's factor structure, as reported by Hellweg and King (1983), consisted of two factors: competence and character. As a presidential incumbent in the 1984 general election, Reagan's factor structure consisted of three factors: competence, extroversion, sociability. While competence remained as the primary criterion for evaluating Reagan between elections, there was a shift in other factors, namely from character to extroversion and sociability.

It is at least plausible in Reagan's case that the second and third factors in the 1984 campaign reflect his alleged reliance on an image campaign and his noted ability to come across on television so effectively.[13] It is also plausible that the incumbent establishes the perceptual agenda in the campaign for the challenger. The fact that Reagan's and Mondale's factor structures were similar for the 1984 campaign would lend credence to this argument.

Overall, this study suggests that an accurate prediction can be made of voting behavior at all election levels when the specific idiosyncratic sets of credibility scales (as candidate image criteria) are employed in the predictions. The key for campaign specialists is to be able to ascertain whose set of criteria the public is following and to accentuate the qualities of their candidates that fit those criteria favorably.

A P P E N D I X

Table 1

Reagan Factor Structure

I	II
qualified - unqualified (.72)	bold - timid (.65)
believable - unbelievable (.64)	verbal - quiet (.73)
intellectual - narrow (.70)	talkative - silent (.62)
trained - untrained (.62)	aggressive - meek (.57)
expert - inexpert (.73)	
intelligent - unintelligent (.73)	

III
sociable - unsociable (.56)
good-natured - irritable (.61)

- -

Table 2

Mondale Factor Structure

I	II
qualified - unqualified (.75)	nice -awful (.77)
experienced - inexperienced (.65)	cheerful - gloomy (.56)
believable - unbelievable (.69)	
reliable - unreliable (.70)	
responsible - undependable (.74)	
trained - untrained (.60)	
competent - uncompetent (.75)	
expert - inexpert (.74)	
intelligent - unintelligent (.64)	

III
verbal - quiet (.68)
talkative - silent (.66)
extroverted - introverted (.55)
aggressive - meek (.59)

Table 3

Bush Factor Structure

I	II
admirable - contemptible (.56)	good-natured - irritable (.56)
reliable - unreliable (.68)	competent - incompetent (.68)
honest - dishonest (.72)	

- -

Table 4

Ferraro Factor Structure

I	II
believable - unbelievable (.59)	bold - timid (.74)
admirable - contemptible (.66)	verbal - quiet (.76)
nice - awful (.59)	energetic - tired (.62)
good - bad (.73)	talkative - silent (.70)
just - unjust (.75)	extroverted - introverted (.63)
honest - dishonest (.68)	aggressive - meek (.70)
responsible - undependable (.70)	
trained - untrained (.62)	
competent - incompetent (.66)	
expert - inexpert (.69)	

Table 5

Hedgecock Factor Structure

I	II
believable - unbelievable (.74)	bold - timid (.58)
admirable - contemptible (.85)	adventurous - cautious (.62)
reliable - unreliable (.83)	energetic - tired (.57)
good - bad (.71)	talkative - silent (.70)
just - unjust (.74)	extroverted - introverted (.56)
honest - dishonest (.87)	
responsible - undependable (.72)	

III
intellectual - narrow (.65)
kind - cruel (.64)
trained - untrained (.71)

- -

Table 6

Carlson Factor Structure

I	II
bold - timid (.78)	believable - unbelievable (.75)
verbal - quiet (.83)	admirable - contemptible (.78)
talkative - silent (.75)	reliable - unreliable (.78)
aggressive - meek (.58)	

III
trained - untrained (.74)
competent - incompetent (.75)
expert - inexpert (.56)
intelligent - unintelligent (.56)

Table 7
Classification Results
for Presidential Candidates

Actual Group	No. of Cases	Predicted Group Membership 1	2
Group 1 - Reagan	163	158	5
		96.9	3.1
Group 2 - Mondale	66	3	63
		4.5	95.5
Ungrouped Cases	36	19	17
		52.8	47.2

Percent of Grouped Cases Correctly Classiified -- 96.51

- -

Table 8
Classification Results
for Vice-Presidential Candidates

Actual Group	No. of Cases	Predicted Group Membership 1	2
Group 1 - Bush	116	109	7
		94.0	6.0
Group 2 - Ferraro	63	9	54
		14.3	85.7
Ungrouped Cases	29	20	9
		69.0	31.0

Percent of Grouped Cases Correctly Classified -- 91.06

Table 9
Classification Results
for Mayoral Candidates

Actual Group	No. of Cases	Predicted Group Membership 1	2
Group 1 - Hedgecock	79	77	2
		97.5	2.5
Group 2 - Carlson	37	3	34
		8.1	91.9
Ungrouped Cases	52	33	19
		63.5	36.5

Percent of Grouped Cases Correctly Classified -- 95.69

FOOTNOTES

[1]Dan Nimmo and Robert L. Savage, Candidates and Their Images: Concepts, Methods and Findings (Pacific Palisades, CA: Goodyear Publishing Company, 1976); Dan Nimmo and Robert L. Savage, "Political Images and Political Perceptions," Experimental Study of Politics 1 (1971): 1-36.

[2]See, for example, Susan A. Hellweg, George N. Dionisopoulos, and Drew B. Kugler, "Political Candidate Image: A State-of-the-Art Review," unpublished manuscript, San Diego State University, 1985.

[3]See, for example, David K. Berlo, James B. Lemert, and Robert J. Mertz, "Dimensions for Evaluating the Acceptability of Message Sources," Public Opinion Quarterly 33 (1969-70): 563-76; William O. Kjeldahl, Carl W. Carmichael, and Robert J. Mertz, "Factors in a Presidential Candidate's Image," Speech Monographs 38 (1971): 129-31; James C. McCroskey, Thomas Jensen, and Cynthia Todd, "The Generalizability of Source Credibility Scales for Public Figures," Speech Communication Association Convention, Chicago, IL, December 1972; Lynda Lee Kaid and Robert O. Hirsch, "Selective Exposure and Candidate Image: A Field Study Over Time," Central States Speech Journal 24 (1973): 48-51; Thomas A. McCain and Paul Rowand, "The Effects of Camera Treatment on Political Speakers' Credibility: Network Television Coverage of the Speeches of Ted Kennedy and George McGovern to the 1972 Democratic Convention," International Communication Association Convention, Montreal, Quebec, Canada, April 1973.

[4]See, for example, Kaid and Hirsch; E. Scott Baudhuin, "From Campaign to Watergate: Nixon's Communication Image," Western Speech 38 (1974): 182-89; Dan Nimmo and Michael Mansfield, "Change and Persistance in Candidate Images as a Result of the Presidential Debates of 1976, 1980, and 1984," Speech Communication Association Convention, Denver, CO, November 1985.

[5]See, for example, Fred R. Silverman, "Candidates' Images," The Great Debates: Kennedy vs. Nixon, 1960, ed. Sidney Kraus (Bloomington, IN: Indiana University Press, 1962) 171-288; Roberta S. Sigel, "Image of the American Presidency: Part II of an Exploration in Popular Views of Presidential Power," Midwest Journal of Political Science 10 (1966): 123-37; Susan A. Hellweg, "An Examination of Voter Conceptualizations of the Ideal Political Candidate," Southern Speech Communication Journal 44 (1979): 373-85; Herbert W. Simons and Kenneth Leibowitz, "Shifts in Candidate Images," The Great Debates: Carter vs. Ford, 1976, ed. Sidney Kraus (Bloomington, IN: Indiana University Press, 1979) 398-404.

[6]See, for example, Susan A. Hellweg and Stephen W. King, "Comparative Evaluation of Political Candidates: Implications for the Voter Decision-Making Process," Central States Speech Journal 34 (1983): 134-38.

[7]See, for example, Peter A. Andersen and Robert J. Kibler, "Candidate Valence as a Predictor of Voter Preference," Human Communication Research 5 (1978): 4-14; Al R. Weitzel and Stephen W. King, "The Nature and Impact of Candidate Image," Western Speech Communication Association Convention, Los Angeles, CA, February 1979.

[8]Hellweg and King.

[9]An effort was made to administer the questionnaires after all of the presidential and vice-presidential debates were over to minimize historical effects.

[10]Each subject was given three questionnaires to complete of the four reported here (one questionnaire per election level). This was done to minimize subject fatigue effects. The number of usable questionnaires resulting from the data collection at each election level was as follows:

(A) Presidential level: 265; (B) Vice-Presidential level: 208; (C) Mayoral level: 168; and (D) Judicial level: 140.

[11]McCroskey, Jensen and Todd.

[12]Tabular data are provided in the appendix to this paper. For further information regarding this data, contact the first author.

[13]See, for example, Peter Goldman and Tony Fuller, The Quest for the Presidency 1984 (New York: Bantam Books, 1985): 264-69; Jack W. Germond and Jules Witcover, Wake Us When It's Over: Presidential Politics of 1984 (New York: Macmillan Publishing Company, 1985): 336-37; "Mondale Says He Mishandled Campaign," San Diego Evening Tribune 9 April 1985: A-4; George J. Church, "The Promise: 'You Ain't Seen Nothin' Yet'," Time 19 November 1984: 41.